

## **Fact Sheet: 2009 Filing Season VITA/TCE**

### **❑ What is VITA/TCE?**

- **Volunteer Income Tax Assistance (VITA)** and **Tax Counseling for the Elderly (TCE)** are two volunteer programs providing free help to low-income, senior, disabled, and non-English speaking persons who need to file simple federal and state tax returns.
- Many military bases also provide VITA services for the US Armed Forces. In 2008, there were 38 **Military VITA** sites throughout California
- In addition to income tax returns, many VITA sites also provide free assistance in the preparation of California Homeowner and Renter Assistance (HRA) claims.
- In California, the major TCE partner is the American Association of Retired Persons (AARP).
- There are approximately 1,100 sites statewide providing free tax assistance.

### **❑ Who can use VITA?**

- VITA provides free, easily accessible assistance to individuals who may have limited income (generally \$40,000 and below), or are non-English speaking or are disabled.

### **❑ Who can use TCE?**

- TCE provides free, easily accessible tax assistance specifically targeting the needs of the elderly.

### **❑ How many people does VITA/TCE assist?**

- Income tax return statistics for 2008:
  - 8,306 volunteers statewide.
  - 1,166 sites.
  - 192,367 income tax returns (79 percent were filed electronically).

- ❑ **The IRS and FTB support the VITA and TCE programs together by:**
  - Administering the programs jointly.
  - Recruiting VITA and TCE volunteers statewide.
  - Providing training to the volunteers.
  - Providing outreach to let the public know about the program.
  - Providing training and support for tax law questions to the Military VITA program.
- ❑ **What is FTB doing to increase awareness of the VITA and TCE programs?**
  - Recruit more volunteers statewide to increase the program's availability at existing sites.
  - Recruit more volunteers from the ranks of tax professionals, non-English speaking members of the community, college students, and government employees.
  - Work with the IRS to increase the number of volunteer sites to better reach individuals in their own neighborhood.
  - Publicize the program statewide to ensure that the citizens most in need of this service know where to go to find help.
- ❑ **Find out more about the VITA or TCE programs**
  - Visit the FTB website at [www.ftb.ca.gov](http://www.ftb.ca.gov) to learn more about VITA and TCE.
  - Visit the IRS website at [www.irs.gov](http://www.irs.gov) to learn more about VITA and TCE.
  - Visit the AARP website at [www.aarp.org](http://www.aarp.org) to learn more about the TCE program.
- ❑ **Contact us:**
  - **Franchise Tax Board  
Public Affairs Office  
916.845.4800**